Summit Central

Getting Started

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Summit Central and Microsoft

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Summit Central operates in a graphics environment called Microsoft Windows, created by Microsoft Corporation. An extension of the MS-DOS operating system, Microsoft Windows gives a standard look and feel to Summit Central and all other Windows applications.

To run Summit Central under Microsoft Windows, you need to license and install Microsoft Windows.

Summit Central and Australia Post

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*Manual written and printed in Australia.

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OVERVIEW

Summit Central is a customer relationship management (CRM) database with multiple functions.

A Contact Management System

Summit Central enables you to track contacts with your clients and prospects and gives reminders of appointments, tasks to be done, etc. It tracks details of people's event attendance history, profiles, groups and user-defined fields and can record details of up to three addresses per person. Data can be imported from a variety of sources and Summit Central gives real-time duplicate checking during the import process.

Summit Central comes with a powerful Reporter that enables you to select and target specific groups of people and produce user-defined lists or address labels. As well as printing reports, any listing or report can be sent as an e-mail attachment, exported to Microsoft Word, exported to Microsoft Excel, exported to a text file or converted to an HTML page for publishing on the web. It can track specific mailouts as well as record bulk contacts that are made using broadcast fax or e-mail.

You can export name and address details to a variety of formats and produce mail merge documents for the selected people. For Summit Event Manager users there is the added ability to send the selected contact details to a Summit event file.

A Master Database

For Summit Event Manager users, Summit Central enables you to keep a master database of people who have attended events, along with details of their participation in each event.

You can send people on the Summit Central database directly to a Summit event file, without opening the event file, either one at a time from the People form or in batches from the Reporter. If you change their details in the Event Manager, you can elect to have those changes automatically reflected in Summit Central, i.e., even though there is a copy of the data, data integrity is still maintained through a seamless interface via the person's PIN number.

Within Summit Central you can nominate an event file and it will import the selected people into the database together with their event participation details. It will update the cumulative event participation history for people already on the Summit Central database.

You can use Summit Central as a master database in conjunction with other event management software packages, but while peoples' records can be imported, event and participation details need to be entered manually.

An Information Interchange Format

Summit Central gives you an easy way to share your database information with others. You can send your data file to the other person and they can download a free Summit Central Viewer from our website. The Viewer will not let them change any information but they will be able to look at the data, run off reports and even export the information to a format they know they can use. The Viewer uses the 'Look but Don't Touch' feature.

People to whom you send these databases will be able to use the information free-of-charge, instantly, without having to worry about data conversions, what order fields are in or whether or not they have the correct software to read the information.

Summit Central Components

The Summit Central core database is the master database and contact management system, however you can purchase additional components including Membership Manager, Products & Services, Short Courses and Donations, which have additional features as outlined below.

Membership Manager

The Membership Manager component of Summit Central allows not only for the recording and tracking of a contact database, it enable users to store and manage memberships, organise tasks to ensure goals are met and produce and record all correspondence such as welcome letters, membership renewal reminders, newsletters, promotional offers, meetings and season greetings and birthday cards.

Through Membership Manager of Summit Central you can define the structure and type of memberships, process expressions of interest, process membership joins and renewals and maintain all financial requirements and banking.

Membership Manager has a meetings feature which allows all past, present and upcoming meetings to be recorded, including the details of the meeting, meeting attendees, agenda and meeting minutes.

Products and Services

Through Summit's additional Products & Services feature you can record items or services provided by your organisation. This function enables the user to enter all items available for sale or rental to clients with the relevant pricing, and print listings of all people who have purchased or rented a particular product or service.

Short Courses

The courses component of Summit Central enables you to create and manage courses/programs in addition to the management of your core contact database. In this function you can manage registrations and attendance to short courses, send correspondence via email to attendees, monitor income and expenditure, and produce attendance certificates. There is also the option of sending SMS Alerts to participants.

Donations

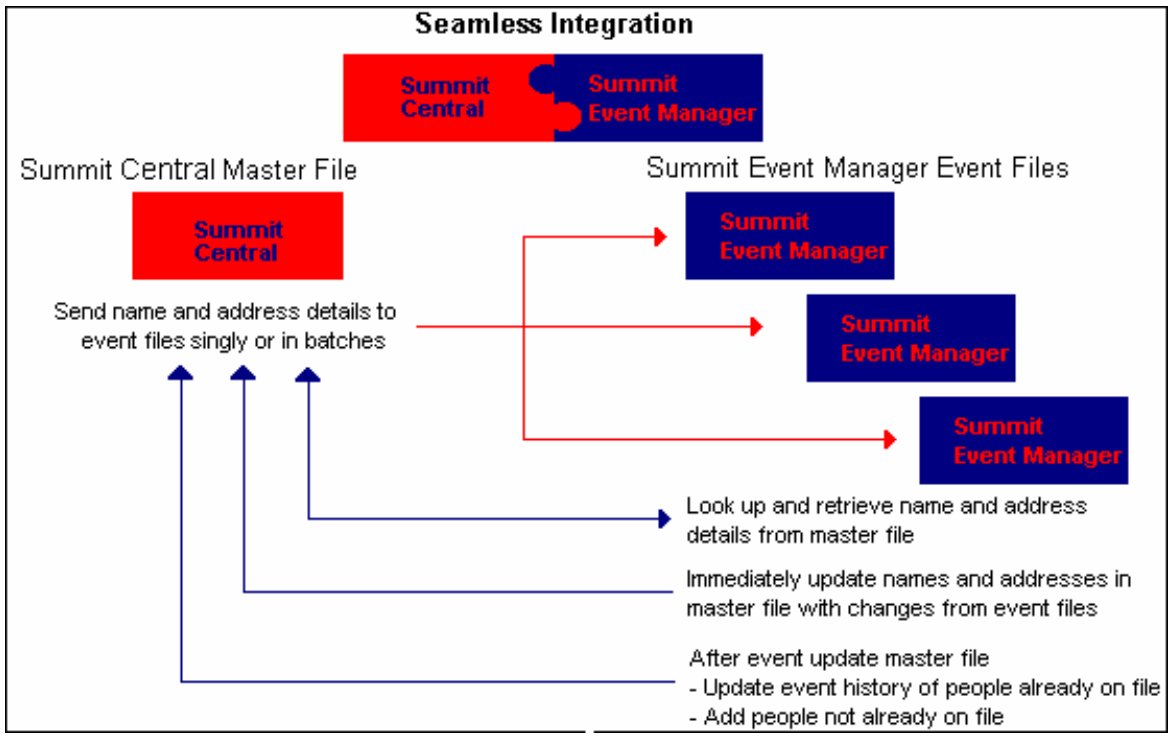
Summit Central Donations Manager enables the user to enter and produce reports on donations for a particular donation campaign, and to define specific elements within each campaign.

Internet Assistant

The Internet Assistant enables the management of forms received via the internet including updating of contact details, membership joining and renewing, demographics update, registrations to courses, online ordering of products and/or services and donations (the last two still in development).

The Summit Suite of Software

MIE Software also develops the Summit Event Manager; software for the management of conferences, seminars, gala dinners and training sessions, or for any occasion where you need to bring people together. The picture below shows in graphical form how the two software packages integrate.


Seamless Integration
Summit Central
Summit Event Manager
Summit Central Master File
Summit Event Manager Event Files
Summit Central
Summit Event Manager
Summit Event Manager
Summit Event Manager
Send name and address details to event files singly or in batches
Look up and retrieve name and address details from master file
Immediately update names and addresses in master file with changes from event files
After event update master file
- Update event history of people already on file
- Add people not already on file

GETTING STARTED

Welcome to Summit Central.

This chapter covers the following information essential to successful installation and use of Summit Central.

- system requirements
- conventions used in this manual and in the software
- changing the screen resolution in a Windows environment
- Summit Central in a networked environment
- installing Summit Central
- installing the Microsoft Access runtime environment for Summit Central
- registration of your Summit software
- start-up options for your first time opening Summit Central
- introduction to the Summit Central forms used in this software
- navigating in Summit Central - what all the standard buttons are and what they do
- help - general and specific
- date formats
- printing reports in Summit Central
- shortcut keys - how to perform certain tasks quickly and easily as well as move around without using the mouse.

System Requirements

Minimum System

Pentium 4 – 1.4 Ghz

Microsoft Windows XP

100 Mb hard disk space

1 Gb RAM or higher

SVGA or higher resolution monitor

CD Drive

Recommended System

Pentium 4 – 2.4 Ghz

Microsoft Windows XP

100 Gb hard disk space

4 Gb RAM

SVGA or higher resolution monitor

CD Drive

WinZip – archive/compression program

MS Outlook – for individual and broadcast e-mails

Express ClickYes – assists with individual and broadcast e-mails (provided free)

MS Access 2003

Conventions used within this manual

This user manual has been designed with the following concepts in mind. It is a standard A4 size so that most descriptions of forms and reports fit on a page and to allow for easy photocopying. The text is in Arial 11 point so that it can be easily read. The following is how the components of Summit are described within this manual:

- Forms, Reports and Menus are in Title Case
- Data fields and Buttons are in *Italics*
- File & folder names and computer commands are in **Bold**

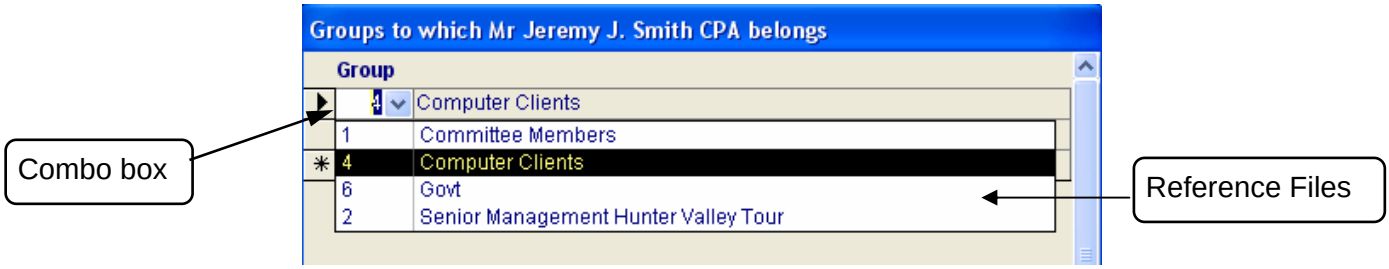
User defined words are enclosed in angled brackets, i.e. < >. Every data entry form has on its toolbar (form footer) as standard the *OK* button, the *Cancel* button and the *Help* button. For brevity, when describing each form, these three buttons are not included. The screens displayed are taken from a Windows XP and 2003 environment, and therefore may appear a different colour to those using earlier versions of these programs.

Field

A field is anywhere you can enter data. Fields can be normal, a combo box, an option box or a check box.

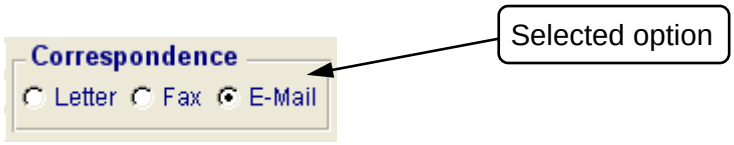
Combo Box

The presence of a combo box indicates that there is a reference file behind the field and usually, but not always, limits the data entry to one of the list (limit-to-list). To see the list of possible entries, click on the down arrow to the right of the field.



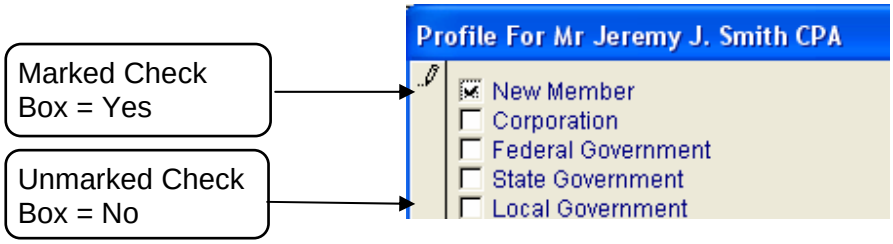
Option Box

An option box has a minimum of two options from which you may choose one. If you click in one option box, you've effectively selected that option to the exclusion of the rest. The selected option is black. Option boxes are always round and are on a raised square.



Check Box

Check boxes are used to indicate Yes or No. If you want to indicate Yes - you 'mark' the check box by clicking in it or pressing the space bar. This puts a tick in the square. Clicking in it again 'unmarks' it to indicate No. Check boxes are always square.



Closing Forms

The forms in Summit Central don't have the system menu icon on the top left hand side of the title bar and must be closed using the command buttons found in each forms toolbar.

Any of the following command buttons will close the active form.

Closes a menu or other non data entry form.

Cancels all changes made to the current record and closes the form. Changes made to sub records will not be cancelled when you exit the main menu in this way.

Saves all changes made to the current record and closes the form.

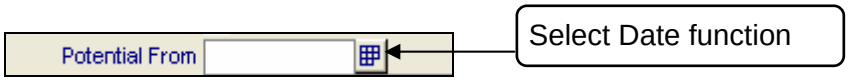
Entering Dates and Times

The quickest way to enter a date is ‘day space month’ or ‘day forward-slash month’ and the current year is assumed. For example, if you entered ‘9 4’ or ‘9/4’, the system will redisplay ‘9-Apr-03’. Every date field has a calendar next to it. See Select Date further on.

The times in Summit are all 12-hour clock. To quickest way to enter a time is ‘time space a’ for an AM time or ‘time space p’ for a PM time. Minutes are indicated by the full stop or the colon. To display 10am, you would enter ‘10 a’ or ‘10 p’ for 10pm. For 12:45pm, you would enter ‘12.45 p’ or ‘12:45 p’. The AM and PM formats are whatever you put in your Time tab of your Regional Settings in your Control Panel.

Select Date Function

This form enables you to select a date using a graphical calendar at the end of each date field and then pass that date back to the field. If there was already a date in the field on the original form, the calendar is set to that date. If the field on the original form was empty, the calendar is set to today’s date.



The bottom of the Select Date form displays the name of the field you’re working on and the date you’ve selected.

The calendar is set to display Sunday as the first column on the calendar. If you wish to you can change this to any day of the week by selecting the day you want from the pull-down list of *First Column*.

Select Date
August
2010
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31
Ending Date of Birth
Wednesday, 20 August 2008
Help
Cancel

The calendar displays one month at a time. If the date you want is currently displayed, position the mouse on the date you want, then click on the left mouse button to select it. If the month or year you want is not displayed, select them from the pull-down lists.

Click on the *OK* button to update the field on the original form. Click on the *Cancel* button to close the calendar without updating the field on the original form.

Changing the Screen Resolution

Prior to installing Summit Central it is useful to check your screen resolution. Summit Central forms have been designed to fit on a screen resolution of 1024 by 768 pixels – XGA (eXtended Graphics Array). If your current screen resolution is less than this (for example, 800 by 600 pixels), the forms won't fit and you'll have to use the scroll bars to navigate.

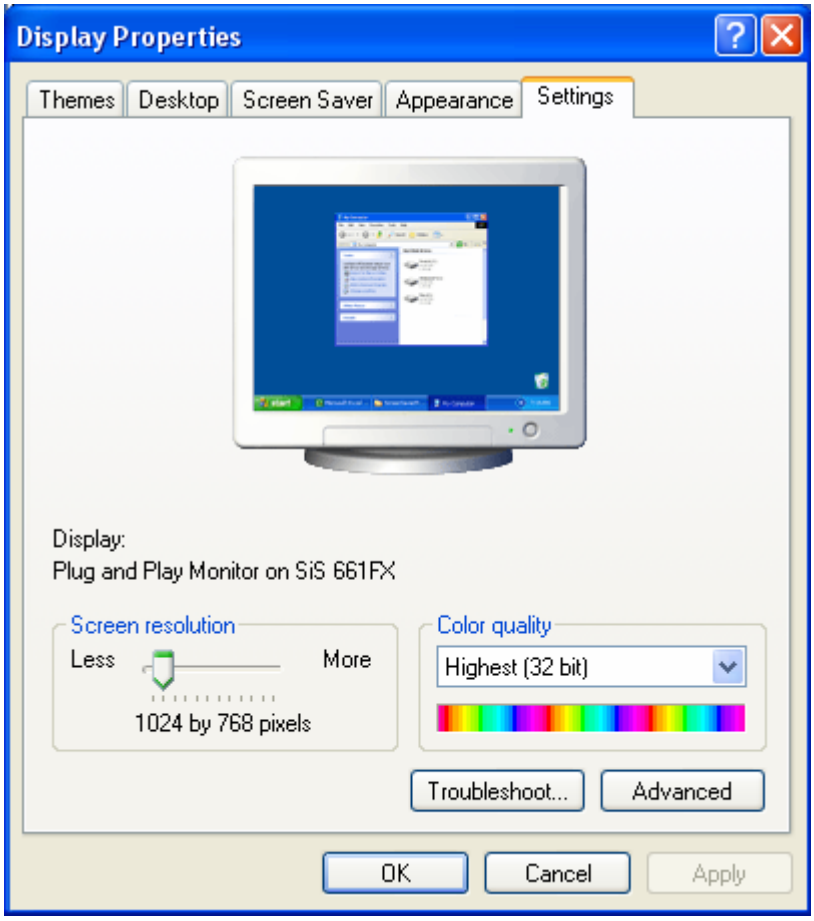
To check and/or modify your screen resolution, take the following steps:

Right mouse click on the desktop to view the desktop menu and click properties.

On the Display Properties Screen, select the Settings Tab, as shown below

Ensure the screen resolution slider bar is set at 1024 by 768 or higher. If it is set lower than 1024 by 768 move the slider bar to adjust.

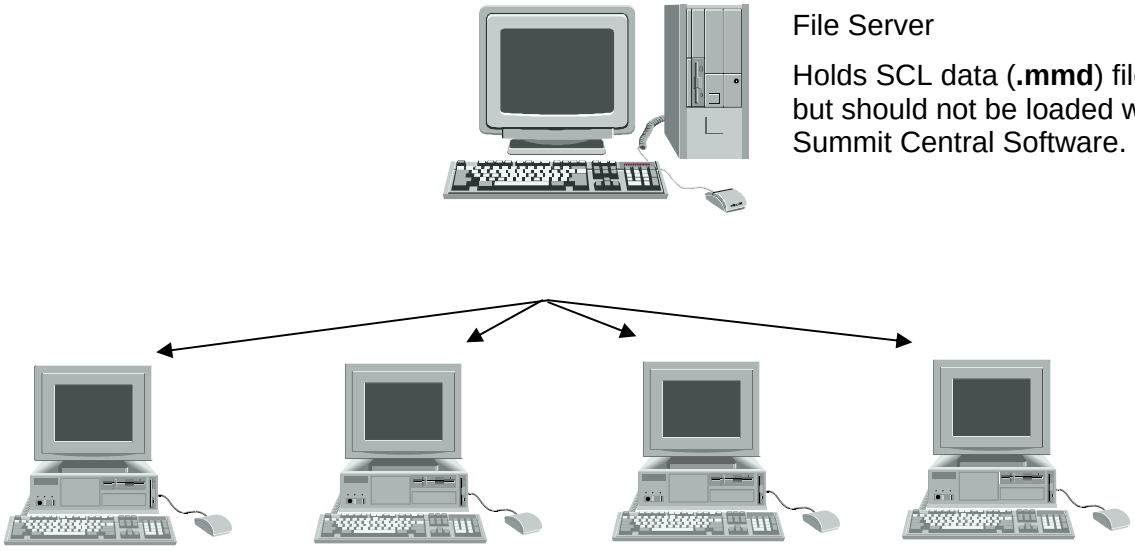
Click Apply to save these changes and exit the Display Settings screen.



Summit Central in a Networked Environment

In a multi-user environment, Summit Central (SCL) can be loaded on up to ten computers on a local area network. Illustrated below are two examples of network set-ups.

Client Server Network

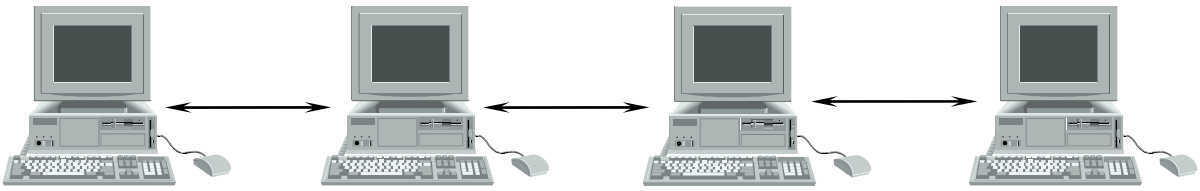


File Server

Holds SCL data (**.mmd**) files but should not be loaded with Summit Central Software.

User 1	User 2	User 3	User 4
Copy of Summit Central	Copy of Summit Central	Copy of Summit Central	Copy of Summit Central

Peer to Peer Network



User 1	User 2	User 3	User 4
Copy of Summit Central and the data (.mdb)	Copy of Summit Central	Copy of Summit Central	Copy of Summit Central

NOTE: The **scl.mdb** file should **not** be loaded on the network as a shared application, but onto the local hard drive of each individual PC wishing to access data (**.mdb**) files - the shared data. Using the **scl.mdb** file as a shared application **will** create conflicts with multiple users overwriting and clearing each other's work tables.

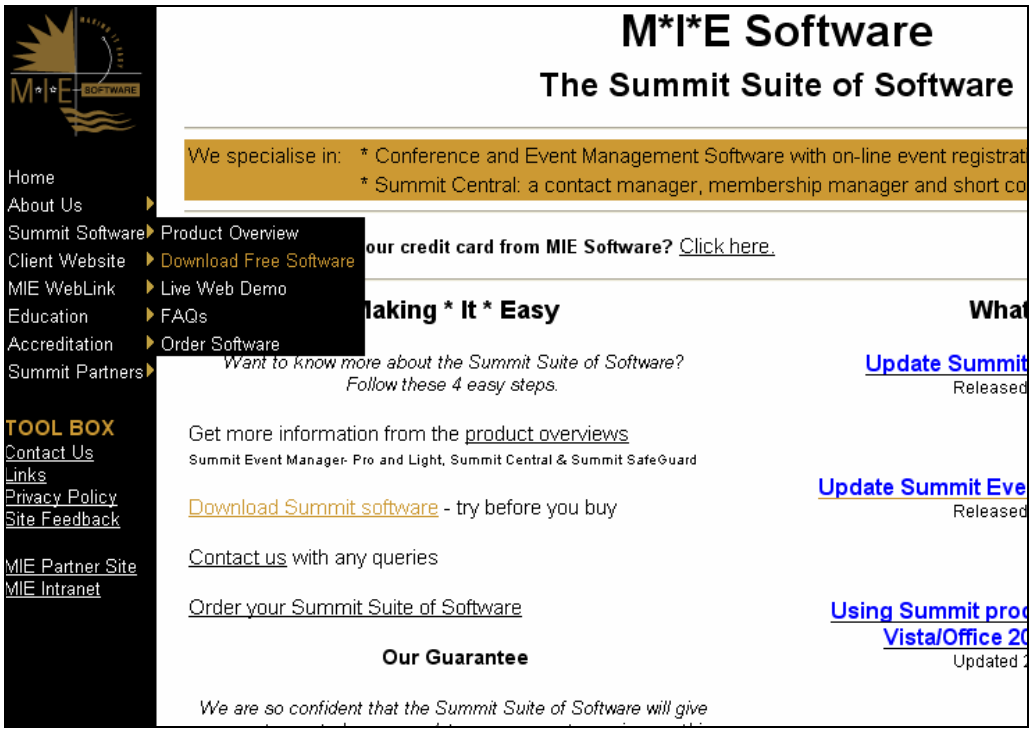
Installing Summit Central

You can only download Summit Central if you have Microsoft Access 2002, 2003 or 2007 running on your computer. If you do not have these installed on your computer you will need to download the Microsoft Access 2003 Runtime environment.

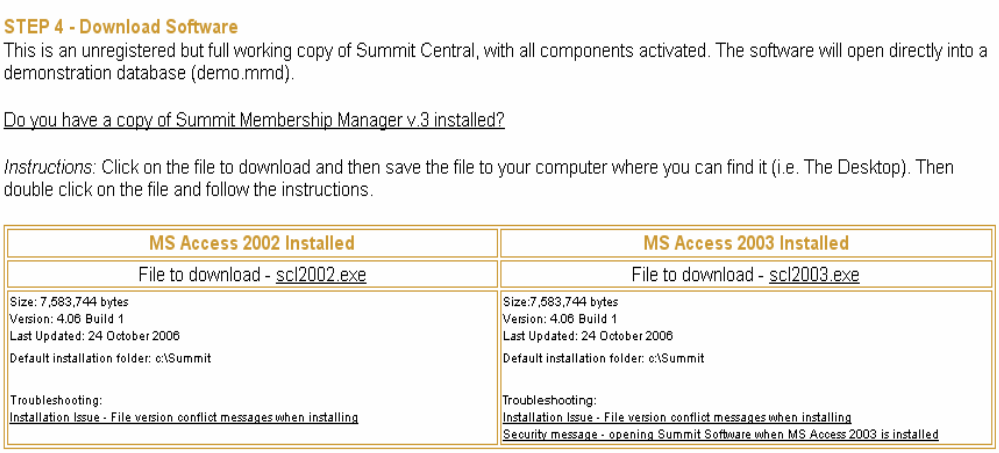
If you have Microsoft Access 2007 installed, you should install the Microsoft Access 2003 version.

From the MIE homepage click on the

Download Free Software link and select Summit Central from the list of options to download

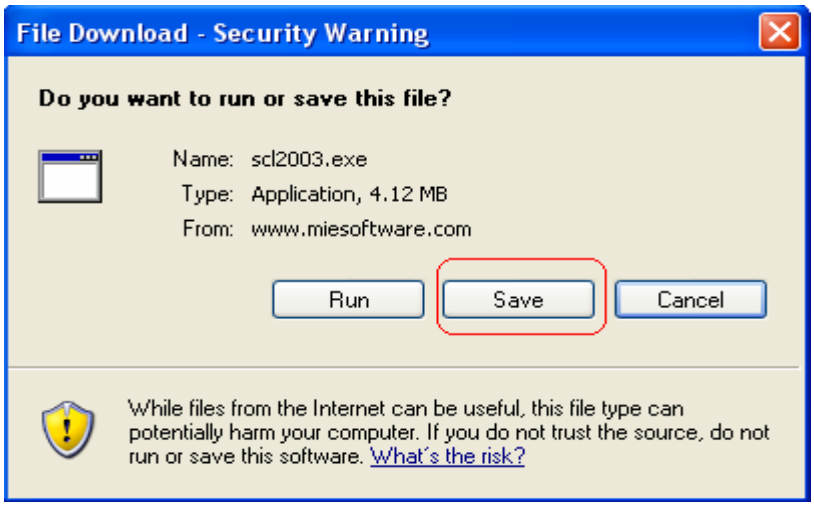


After Reading Steps 1-3, double Click on the version of Summit Central required – choose the option to 'Save'.

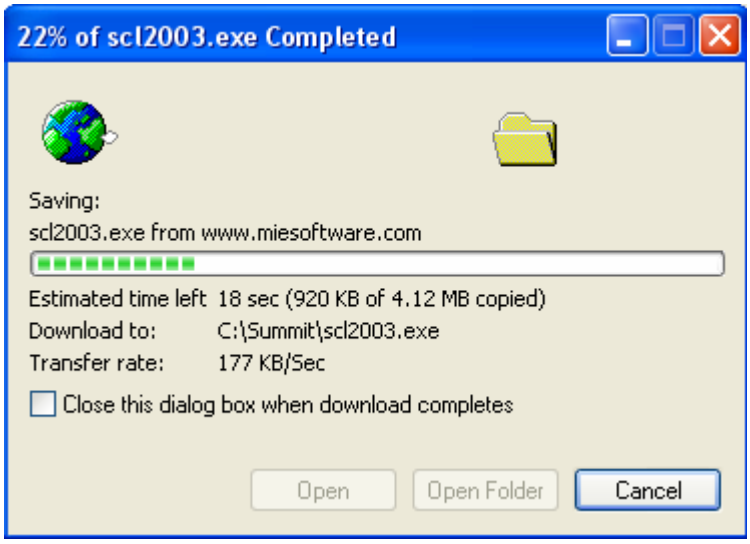

STEP 4 - Download Software
This is an unregistered but full working copy of Summit Central, with all components activated. The software will open directly into a demonstration database (demo.mmd).
Do you have a copy of Summit Membership Manager v.3 installed?
Instructions: Click on the file to download and then save the file to your computer where you can find it (i.e. The Desktop). Then double click on the file and follow the instructions.
MS Access 2002 Installed
File to download - scl2002.exe
Size: 7,583,744 bytes
Version: 4.06 Build 1
Last Updated: 24 October 2006
Default installation folder: c:\Summit
Troubleshooting:
Installation Issue - File version conflict messages when installing
MS Access 2003 Installed
File to download - scl2003.exe
Size:7,583,744 bytes
Version: 4.06 Build 1
Last Updated: 24 October 2006
Default installation folder: c:\Summit
Troubleshooting:
Installation Issue - File version conflict messages when installing
Security message - opening Summit Software when MS Access 2003 is installed

Click Save to begin the installation process.

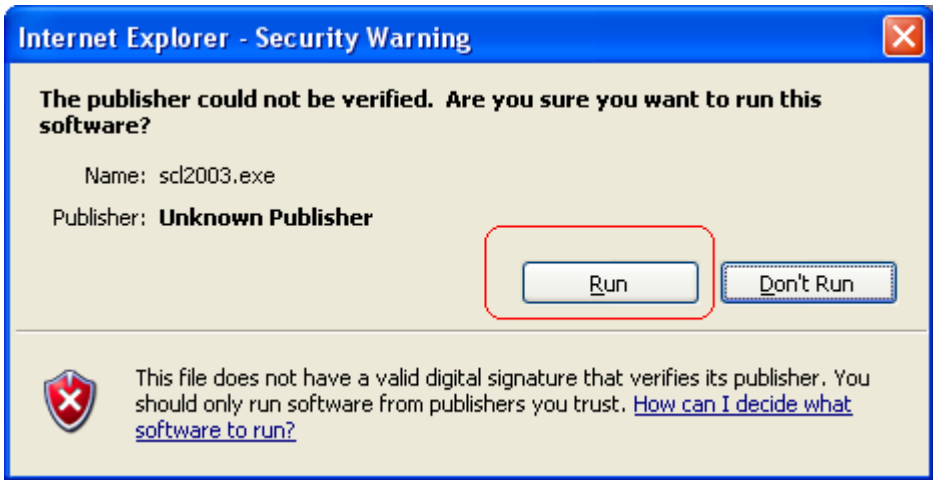
Save the file to a place on your computer where you will find it again, this should usually be in your C: drive under downloads.


File Download - Security Warning
Do you want to run or save this file?
Name: scl2003.exe
Type: Application, 4.12 MB
From: www.miesoftware.com
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

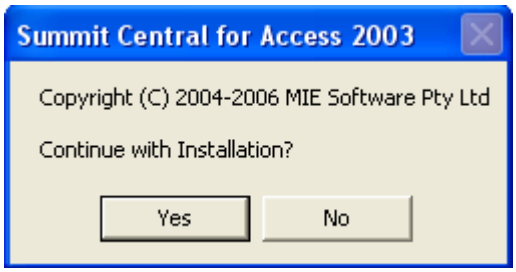
Summit Central will download all the relevant files.



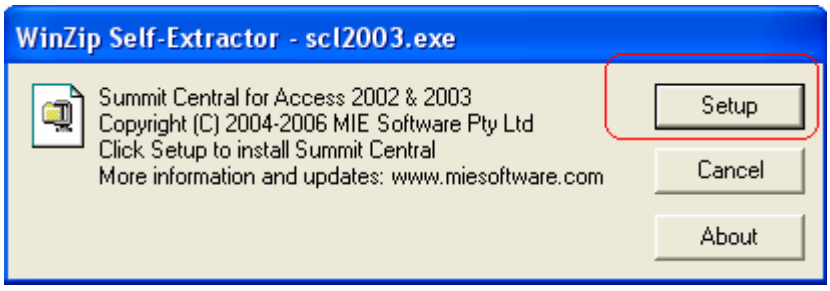
Click *Run*.


Internet Explorer - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: scl2003.exe
Publisher: Unknown Publisher
Run
Don't Run
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust. How can I decide what software to run?

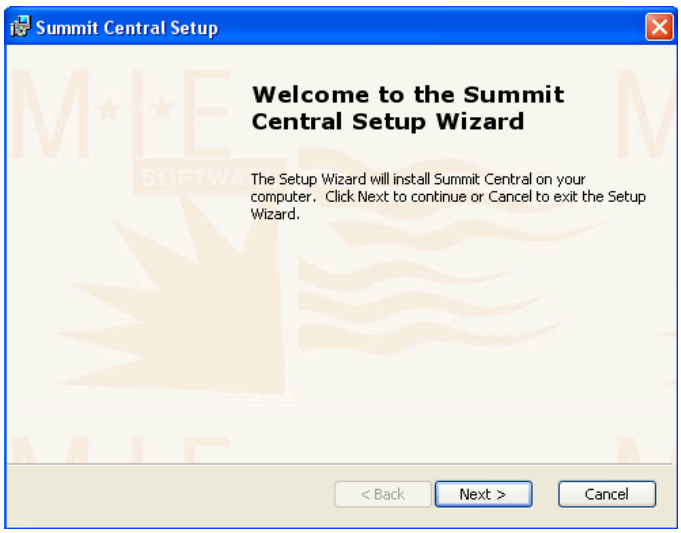
Click Yes to continue with the installation.



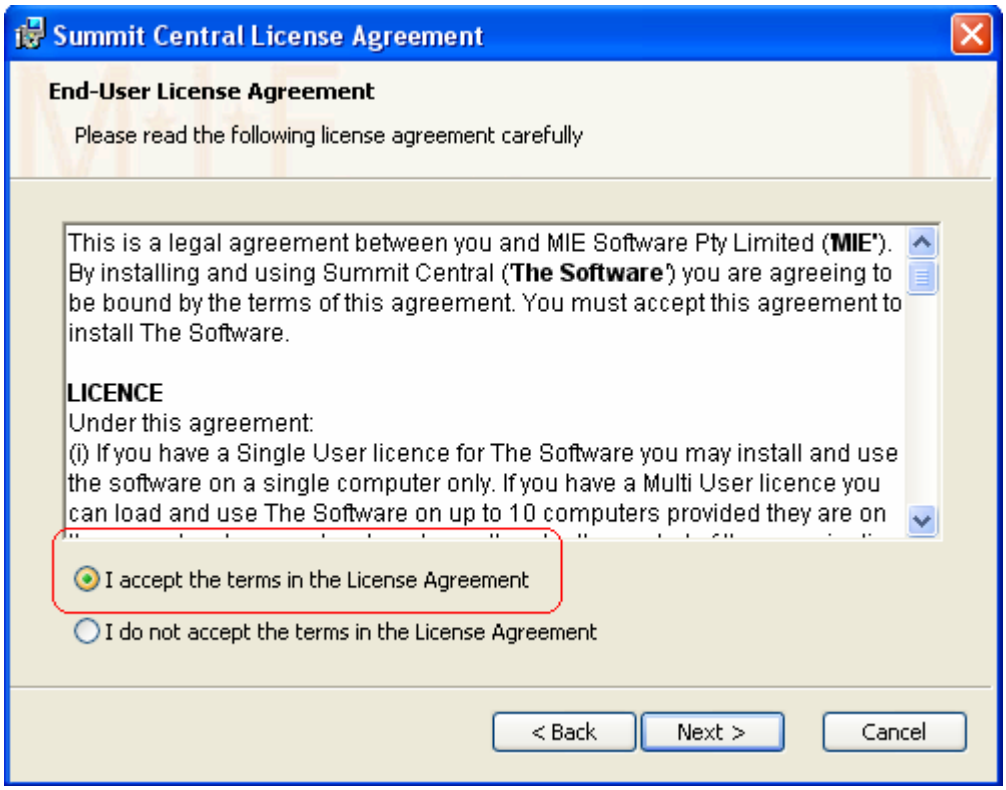
Select the Setup button where you will be prompted to the Setup Wizard.


WinZip Self-Extractor - scl2003.exe
Summit Central for Access 2002 & 2003
Copyright (C) 2004-2006 MIE Software Pty Ltd
Click Setup to install Summit Central
More information and updates: www.miesoftware.com
Setup
Cancel
About

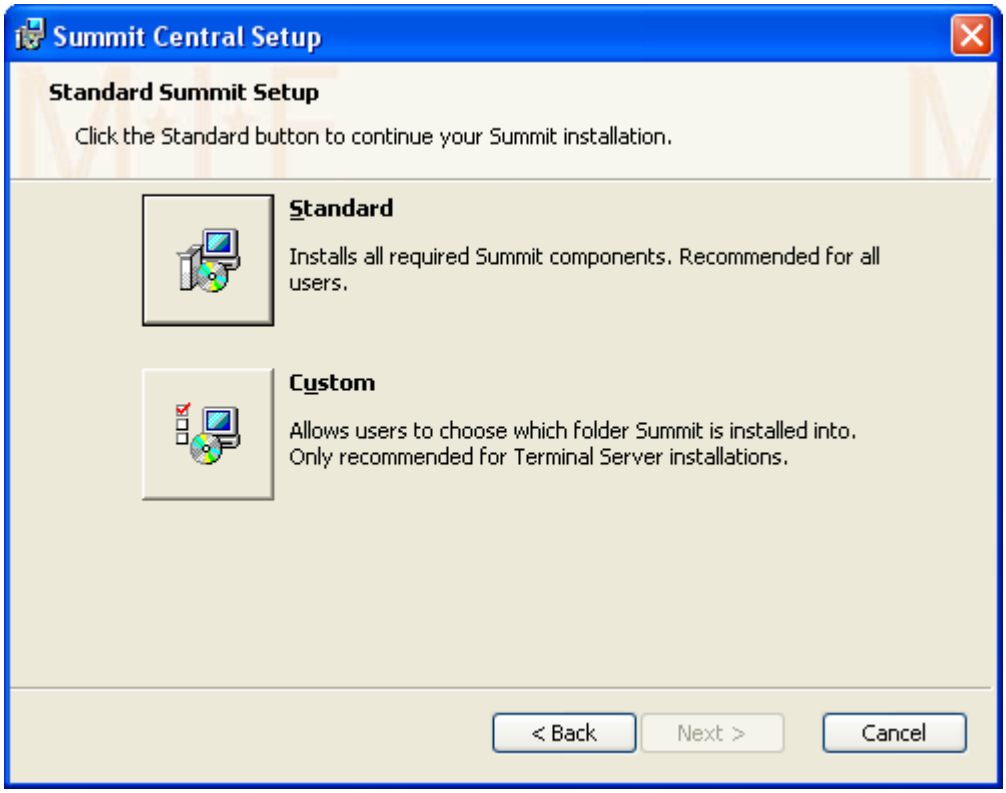
Click *Next*


Summit Central Setup
Welcome to the Summit Central Setup Wizard
The Setup Wizard will install Summit Central on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
< Back
Next >
Cancel

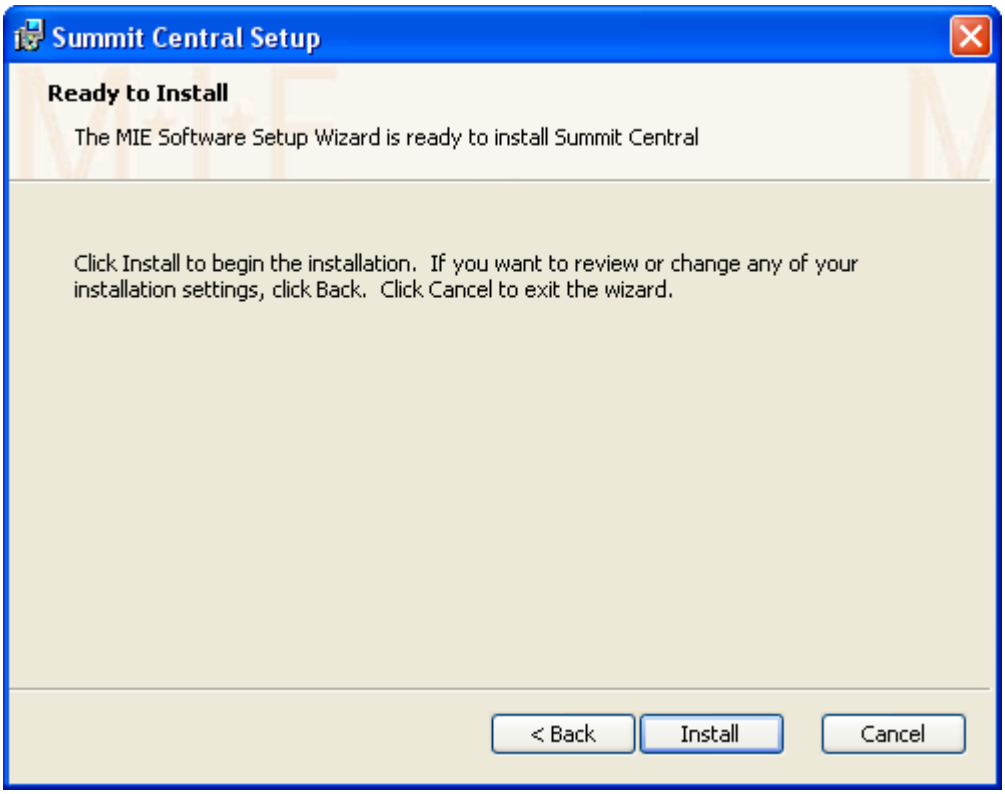
Select *I Accept the terms in the Licence Agreement* and then click *next*


Summit Central License Agreement
End-User License Agreement
Please read the following license agreement carefully
This is a legal agreement between you and MIE Software Pty Limited ('MIE'). By installing and using Summit Central ('The Software') you are agreeing to be bound by the terms of this agreement. You must accept this agreement to install The Software.
LICENCE
Under this agreement:
(i) If you have a Single User licence for The Software you may install and use the software on a single computer only. If you have a Multi User licence you can load and use The Software on up to 10 computers provided they are on
I accept the terms in the License Agreement
I do not accept the terms in the License Agreement
< Back
Next >
Cancel

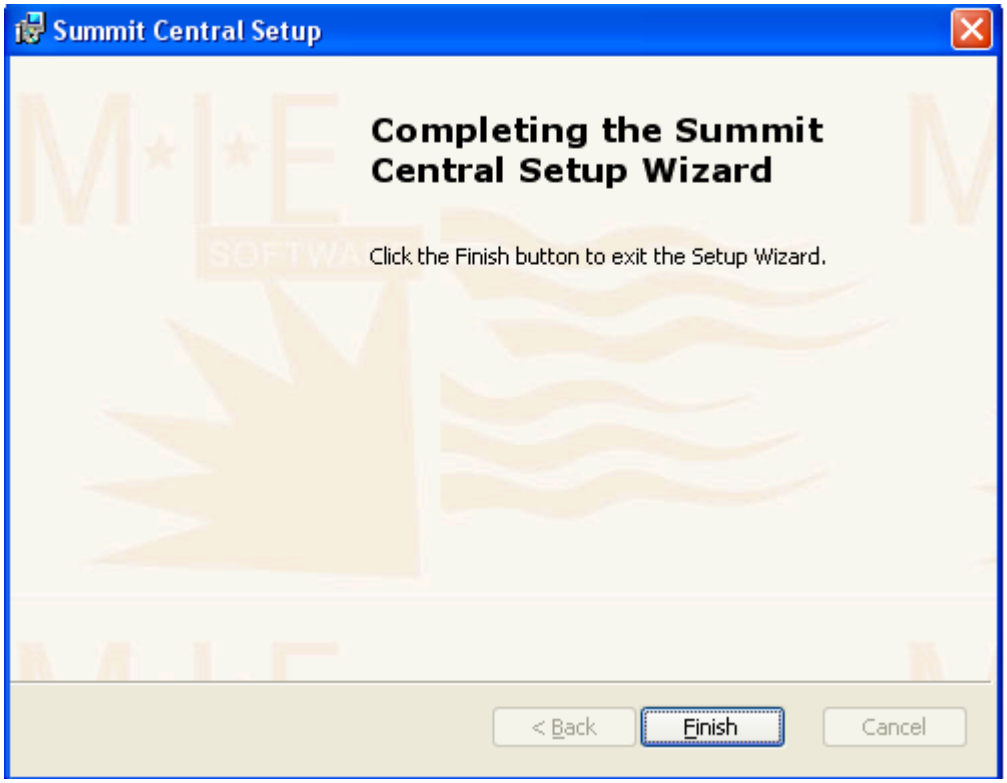
Click the *Standard* button to continue


Summit Central Setup
Standard Summit Setup
Click the Standard button to continue your Summit installation.
Standard
Installs all required Summit components. Recommended for all users.
Custom
Allows users to choose which folder Summit is installed into. Only recommended for Terminal Server installations.
< Back
Next >
Cancel

Click *Install*

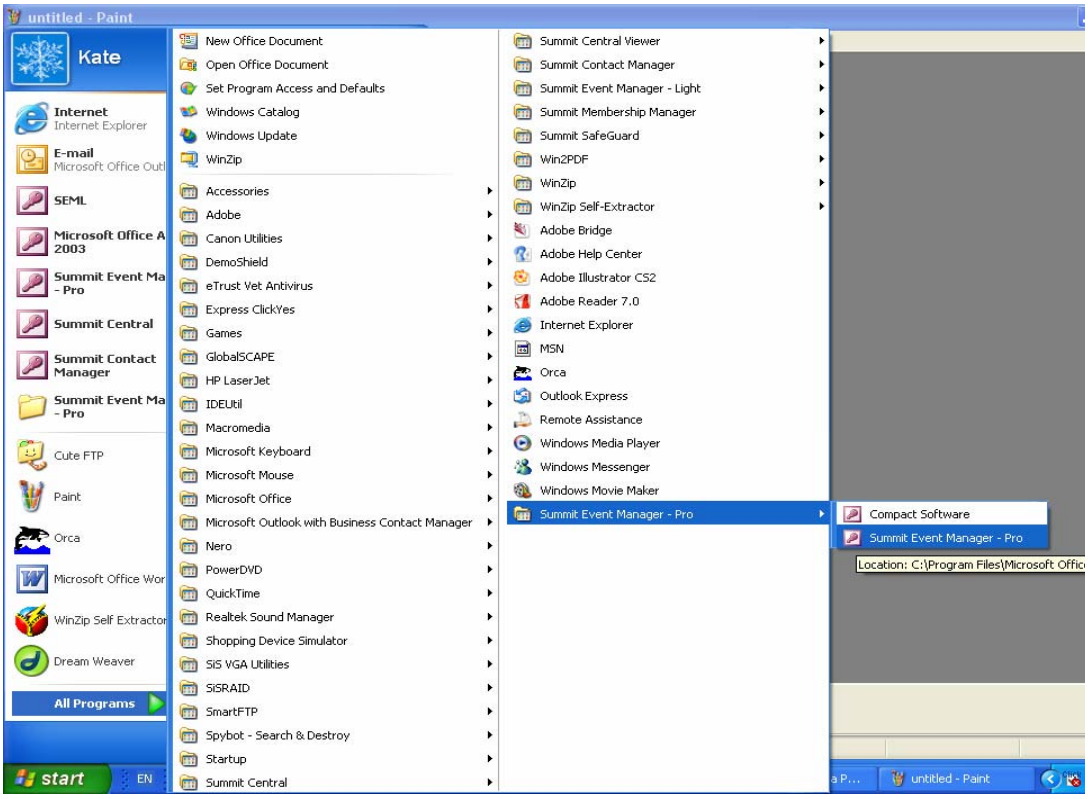

Summit Central Setup
Ready to Install
The MIE Software Setup Wizard is ready to install Summit Central
Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
< Back
Install
Cancel

Click *Finish*



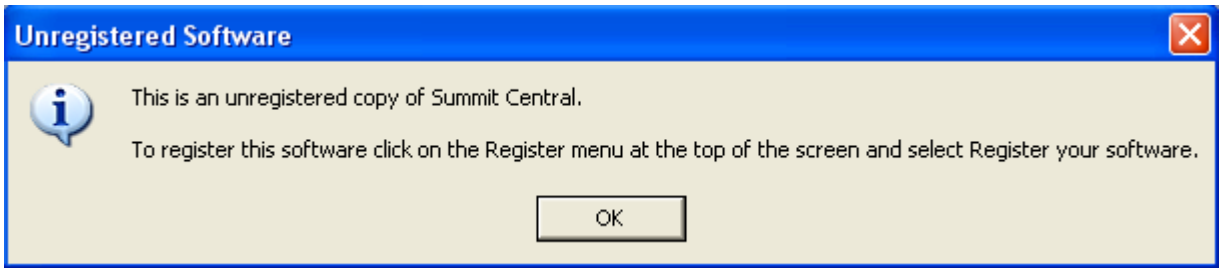
After the wizard is complete select *Finish* and your Summit Central Setup is complete.

A Shortcut will automatically be placed on your desktop and in your start menu.



Software Registration

When you open Summit Central for the first time you will be prompted to register the software as seen below.

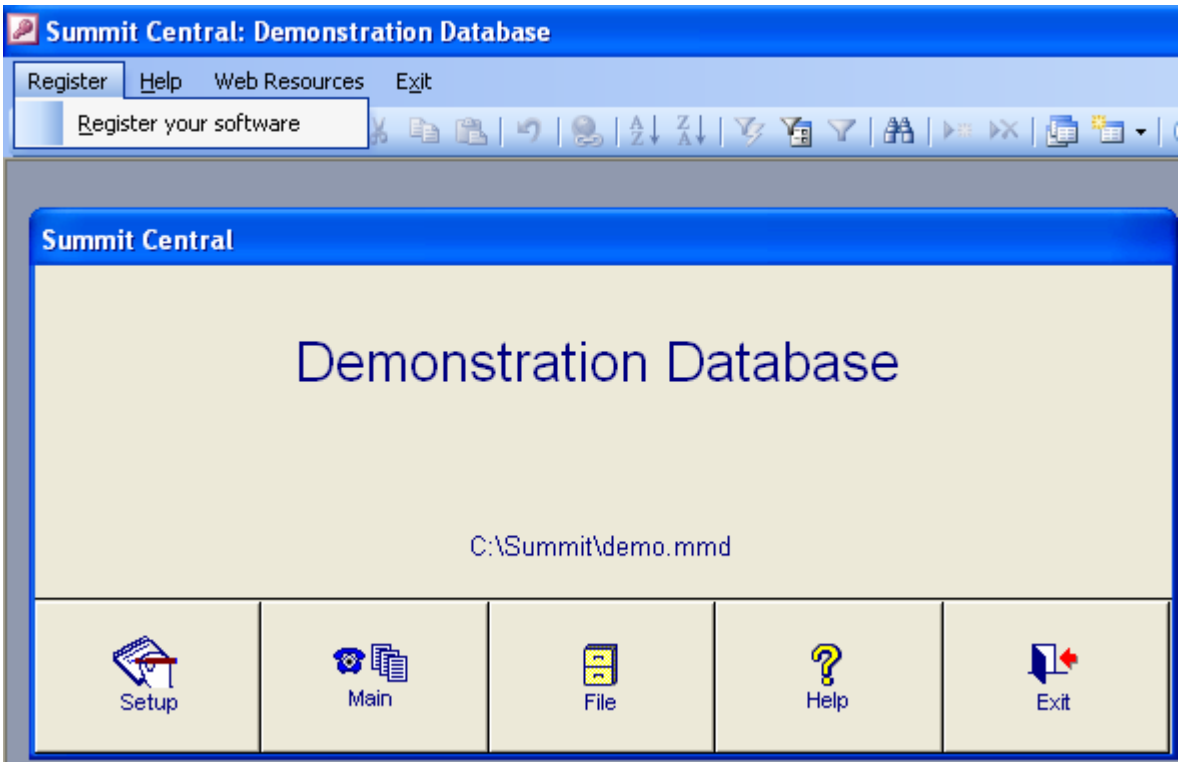

Unregistered Software
This is an unregistered copy of Summit Central.
To register this software click on the Register menu at the top of the screen and select Register your software.
OK

While it is quite legal to use unregistered copies of Summit Central, there are benefits to registering your software.

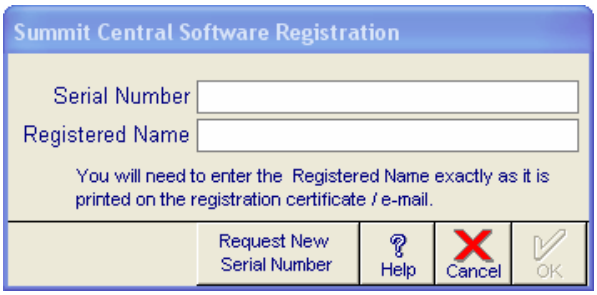
The main benefits of registered software are:

- With registered software, there is no limit to the number of records that can be entered or imported into each database; unregistered software has a maximum of 20 records per database.
- With registered software, you're entitled to three months of free telephone, fax or e-mail support calls. No support is provided for unregistered software.
- Registered software runs more quickly than unregistered software.

To register your software you need a serial number. This will be supplied by MIE Software upon purchase. To register your software click on the Register button of the toolbar in Summit Central.



If you have not received a serial number you can request one by clicking the 'Request New Serial Number' button shown below or you can contact MIE Software.

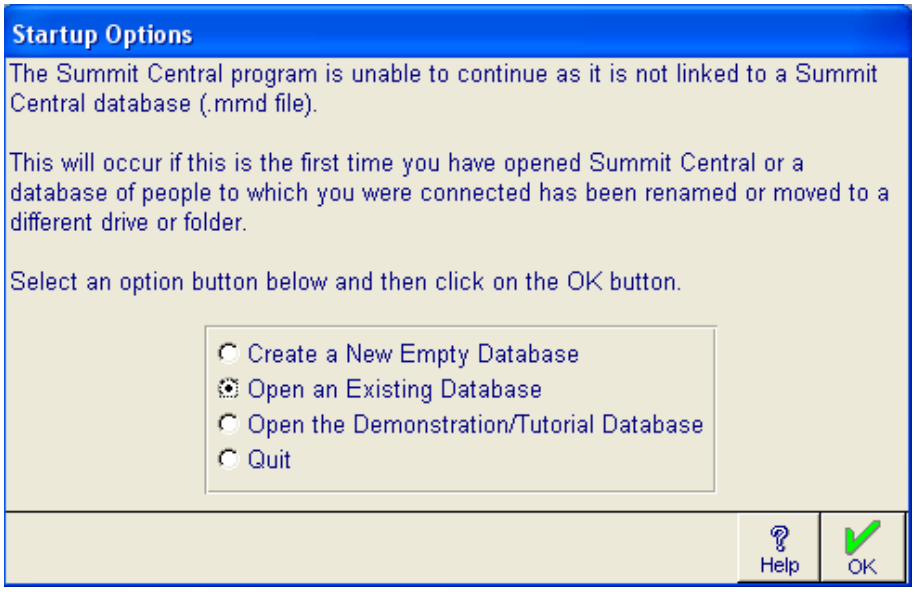

Summit Central Software Registration
Serial Number
Registered Name
You will need to enter the Registered Name exactly as it is printed on the registration certificate / e-mail.
Request New Serial Number
Help
Cancel
OK

Starting Summit Central

When you first install Summit, a new submenu is added to the Programs menu. To access Summit Central you can either double-click on the icon which is automatically placed on your desktop during installation, or you can locate the program through the **Start** menu list of **Programs.**

Startup Options

The form below will be displayed when you launch Summit Central and it is unable to link to a Summit Central database.


Startup Options
The Summit Central program is unable to continue as it is not linked to a Summit Central database (.mmd file).
This will occur if this is the first time you have opened Summit Central or a database of people to which you were connected has been renamed or moved to a different drive or folder.
Select an option button below and then click on the OK button.
Create a New Empty Database
Open an Existing Database
Open the Demonstration/Tutorial Database
Quit
Help
OK

This will happen if this is the first time you have launched Summit Central (and no Summit Central databases have been created) or the database to which Summit Central was last linked has been moved, renamed or deleted.

Select whether you wish to *Create a New Empty Database*, *Open an Existing Database, Open the Demonstration/Tutorial Database* or *Quit* Summit Central by selecting the appropriate option button.

Open the Demonstration/Tutorial Database, will connect you to a 'demonstration' database that's already been created by MIE Software with fictional data. **You should select this option if this is the first time you have launched Summit Central**

Create A New Empty Database, will ask you to provide a filename, and a new database with that filename will be created. The filename you provide must comply with the Windows filename

requirements and must end in ".mmd". If you want to create the Summit Central database in another folder or on a network drive, use the *Browse* button. If you want to create the Summit Central database in the default Summit Central folder (c:\Summit), simply enter the filename you wish to call it.

Open an Existing Database, Summit Central will ask you to provide a filename, and this must be the name of the Summit Central database you have already created. If the Summit Central database is in another directory or on a network drive, use the *Browse* button to locate the file. If the Summit Central database is in the Summit Central directory, just select the filename.

Quit, will close Summit Central.

OK will exit enable the requested action to be completed, i.e. create new or open existing database.

Printing Reports

When you click on the *Preview*

button or the *Listing*

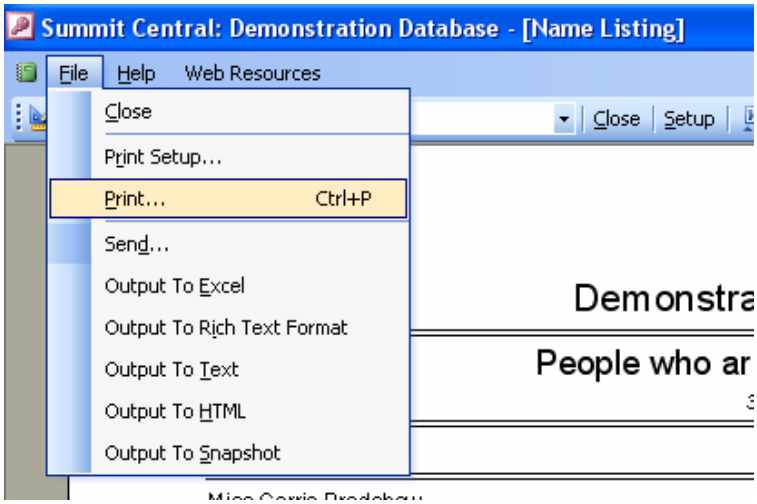
button, all reports and listings are printed in print preview, i.e., they are printed to the screen. If you want to do more than just look at the report on the screen, click on the File menu in the top left hand corner of the screen.

If you click on Close, you close the report.

If you click on Print Setup..., you can change the margins, columns and other details of the report.

If you click on Print..., the following form is displayed. Within this form you can direct the report to any printer, print part of the report, print multiple copies, alter the print setup, etc.

If you click on the Send... button (if enabled) it interfaces to the Mailing system on your network, e.g. to Microsoft Outlook as a new message.

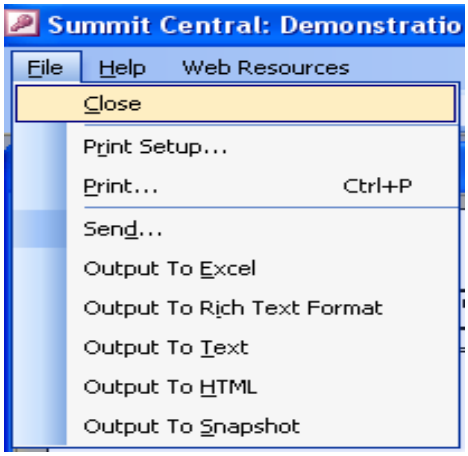


Additionally you can create a new version of the report in Excel, Rich Text Format, Text or a HTML document.

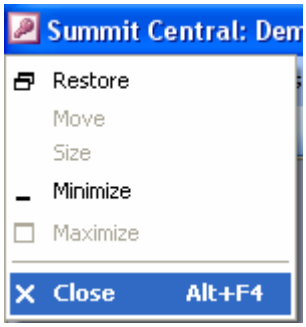
Closing Reports

You can exit a report in Summit Central in one of three ways.

1. Click on File then the Close or press Alt+F+C



2. Select Close from the system menu icon as shown below, however, this will close down Summit Central completely.



3. Press the *Esc* button on your keyboard. This last option is the easiest.

Shortcut Keys

Copying

Ctrl+C	Copy the selection onto the Clipboard.
Ctrl+V	Paste the contents of the Clipboard at the insertion point.
Ctrl+X	Cut the selection and copy it onto the Clipboard.
Ctrl+' (single quote mark)	Insert the same value as in the same field in the previous record.

Deleting

Backspace	Delete the selection or the character to the left of the insertion point.
Delete	Delete the selection or the character to the right of the insertion point.

Undoing Changes

Ctrl+Z or Alt+Backspace	Undo typing.
Esc	Undo changes in the current field or current record; if both have been changed, press Esc twice to undo changes first in the current field and then in the current record.

Text Formatting

Ctrl+U	Change current field to UPPER CASE.
Ctrl+L	Change current field to lower case.
Ctrl+T	Change current field to Title Case.

Moving Around

Right Arrow	Move one character to the right.
Ctrl+Right Arrow	Move one word to the right.
End	Move to the end of the line.
Ctrl+End	Move to the end of the field in multiple-line fields.
Left Arrow	Move one character to the left.
Ctrl+Left Arrow	Move one word to the left.
Home	Move to the beginning of the line.
Ctrl+Home	Move to the beginning of the field in multiple-line fields.
Tab, Right Arrow, or Enter	Move to the next field. Enter key moves to the next line in multiple line fields.
Shift+Tab	Move to the previous field.
F5	Move to the record number box; then type the number of the record you want to go to and press Enter.
Ctrl+Tab	Exit the subform and move to the next field in the master form; if not in a subform, move to the next field.

Combo Boxes and List Boxes

Alt+Down Arrow	Open/close a combo box or list box.
Down Arrow	Move down one line in a combo box or list box.
Page Down	Move down one set of values in a combo box or list box.
Up Arrow	Move up one line.
Page Up	Move up one set of values.
Tab	To exit the combo box or list box.

Miscellaneous

Ctrl+W	Determine Which database you're currently connected to.
Ctrl+O	Opens the Database Options form.
Ctrl+R	Opens the Organiser form.

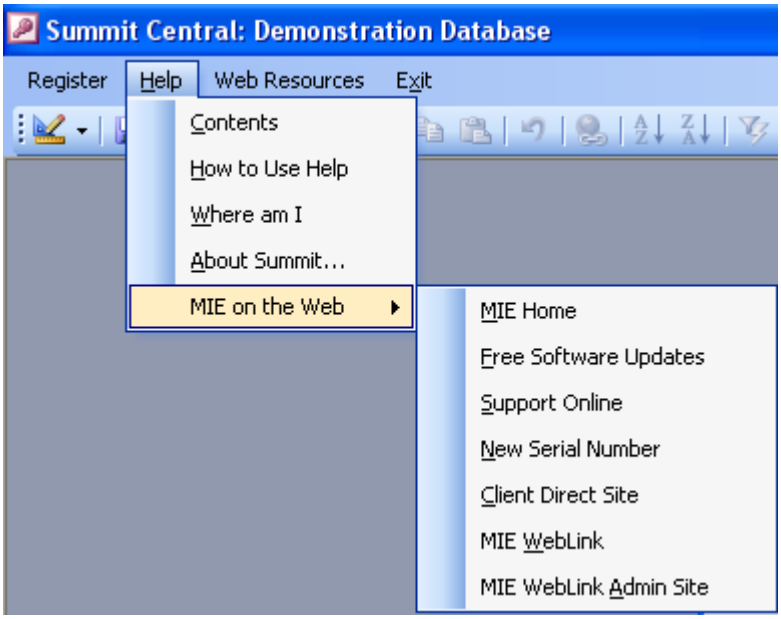
People Form

Alt+C	Record a contact with this person.
Alt+E	Open the Event History form for this person.
Alt+G	Open the Groups form for this person.
Ctrl+G	Get the postcode for the current person's record. (Australia only).
Alt+H	Open the Contact History form for this person.
Alt+M	Open the Membership form for this person.
Alt+P	Open the Profile form for this person.
Alt+R	Open the Personal Information form for this person.
Alt+S	Send this person's name and address details to a Summit Event Manager event file.
Alt+U	Open the User Defined Fields form for this person.

Help

General Help

If you click on Help at the top of the screen, a list of options is available as shown below.



- Contents is the table of contents to the help documentation. Click on the area you'd like to see.
- How to Use Help displays the Windows Help facility.
- Where am I will tell you which database you're currently working on (the short name, the long name and the full file name). This information can be e-mailed directly to MIE Software.
- About Summit... displays your registration and version number (see below for more information)
- MIE on the Web will display another menu which will direct you to pages of interest on our website.

Displaying on-line help for the current form

Summit's on-line help is context sensitive. This means whenever you want help, the help displayed relates to the form you're on. You can display on-line help for the current form in the following ways:

Press the F1 key on your keyboard.

Click on the *Help* button as illustrated.

Displaying on-line help for the current report

You can display on-line help for the currently open report by pressing the F1 key on your keyboard.

About Summit

To display the About the Summit form, select *About Summit...* from the Help menu. This form displays details of the version of Summit Central that is installed and to whom this copy of it is licensed.

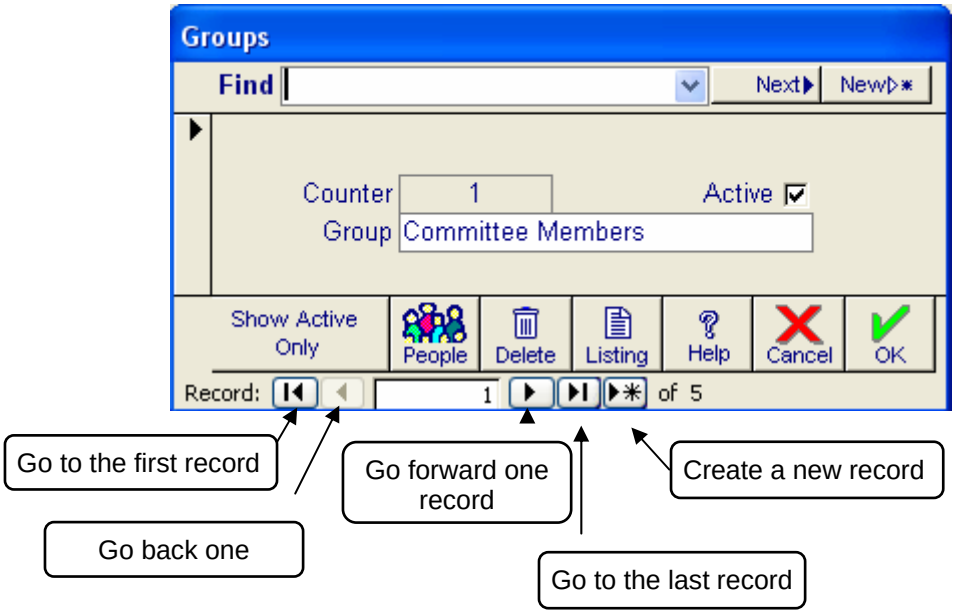
If the information in the *This product is licensed to:* box is “Evaluation Software Only” you’re running the evaluation software and there are no restrictions on its use, however there is a limit on the number of records you can enter and import. If the information in the *This product is licensed to:* box is *not* “Evaluation Software Only” and does not display your details you’re probably using the Summit Central illegally. If you’re using the software illegally you should be aware that this computer program is protected by copyright law and international treaties.

The licence for the Summit Central software can be single or multi-user. If it’s the latter, it’s a group licence that allows the software to be loaded on to up to ten computers provided they are on the same local area network (LAN) and under the control of the same organisation. The group licence does not cover installation in different branches of the same organisation or different organisations on the same local area network under the same licence.

If you’re in **any** doubt as to the legality of your copy of Summit Central, please contact MIE Software immediately.

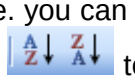
Standard Form Design

All the forms within the setup menu are divided into parameter files (only one record, for example, Database Options) and reference files (can have many records, for example, Groups) and all have standard toolbar buttons at the bottom of the form. The example below is the Groups reference file form.



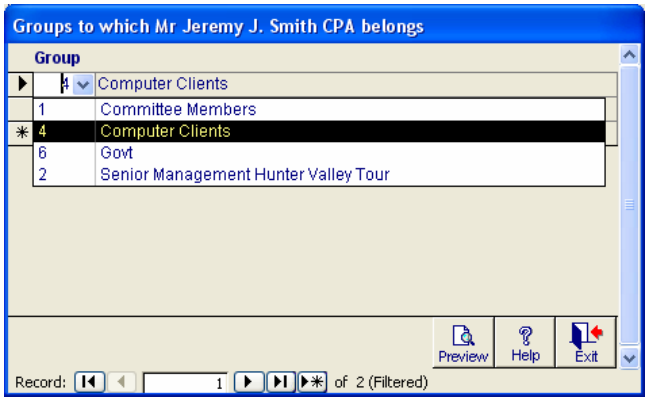
Reference Files

In the reference file forms, the navigation buttons at the bottom of the form indicate how many records you have and which record you're currently on. In the above example you are located on record 1 of 6 records. This is also the method you use to move from one record the next.

If you have Microsoft Access 2002 or 2003 installed on your computer you can click into any field in the form and sort by that field, i.e. you can sort by the counter, the description or a date. Click on the ascending or descending button  to sort in alphabetical or numerical order or the find button to search specific data within the selected field.

Combo Box

The data entered in to the Groups reference file, as shown above, will appear as options in a 'combo box' in the people form. That is, each Group type entered in the reference file forms a drop down list from which to choose.



To select a group type simply click on the down arrow next to the group and select the relevant option. If the reference file has a counter as the first field it means the counter, or the index to that record is stored in the main file, not the text. This means you can alter the text in the reference file and it will be reflected throughout the system immediately. If there is no counter, then the text itself is stored in the file. In this case if you alter the text in the reference file, it will not be changed in all old records that contain that item.

Toolbar Buttons

The following are the standard toolbar buttons found on most forms with Summit Central.

People By clicking on this button you can get a list of people who are included within the displayed record, eg, in the particular Group or who attended an event.

Delete deletes the current record. A warning message will first appear asking you to confirm deletion of the record and its contents.

Listing prints the contents of the underlying reference file to the print preview screen.

Help displays the on-line help appropriate to where you are.

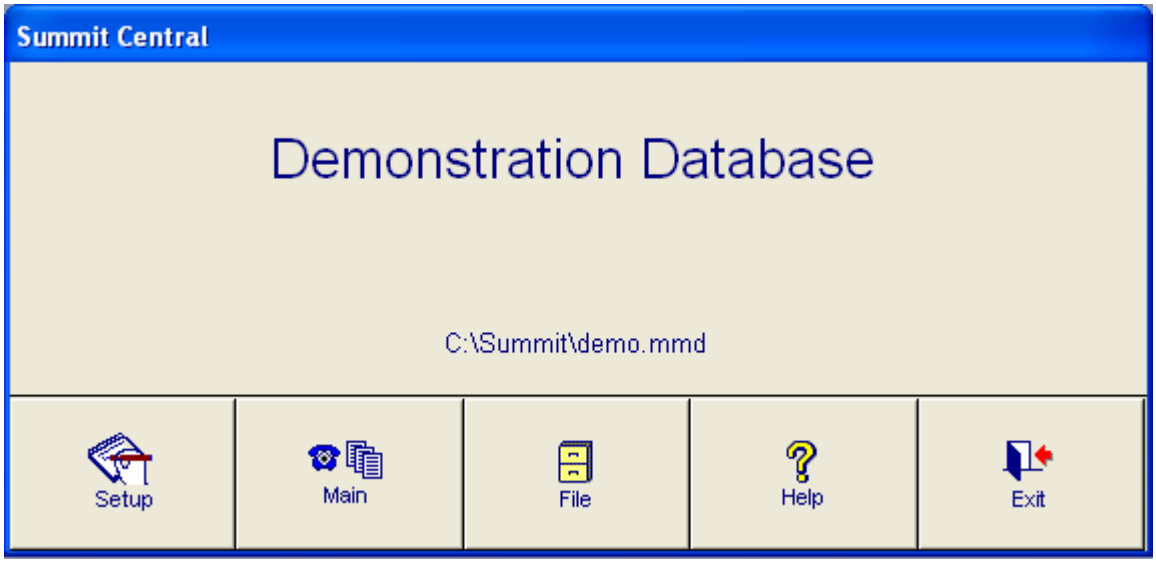
Cancel cancels any changes made to the record and exits the form

Ok saves any changes made to the current record and exits the form.

Show Active Only/Show All is a double button which gives the user the option to display only reference files that are currently in use (active), or to display all reference files in the current form.

Entry Menu

The Entry Menu is the normal entry and exit point for Summit Central. It is also the point from which you can create *new*, *open* existing or *compact and repair* existing Summit Central databases.



When you first launch Summit Central the Entry Menu is displayed. Outlined below are the functions of each menu button found here.

The Setup Menu is the starting point for setting up Summit Central database to work effectively for you. From this menu you define the optional settings for the database, interest profiles, user defined fields and reference files used throughout the database. See pages 40 to 69 of this manual

The Main Menu is where you enter information about people, contacts and follow up tasks and produce reports on the information in your database. You can also use the Main Menu for importing information and to access utility functions. See pages 70 to 161 of this manual

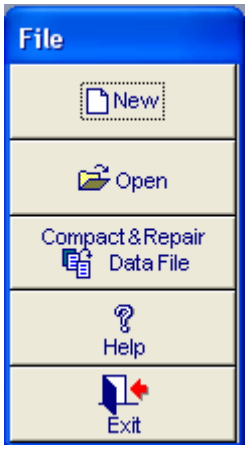
The File Menu is used for creating new databases, opening existing databases and compacting and repairing databases. See next page.

The Help Menu displays the Summit Central help function useful to new users and for clarifying features of the program. The Help Menu contains a Glossary of Terms, a How to Guide of Summit functions and Index of terms to search specific help topics.

Exit closes Summit Central.

File

The File Menu is the point from which you can create new Summit Central databases, open existing databases and compact and repair databases.



- To create a new Summit Central database, click on the *New* button.

  Summit Central will ask you to provide a filename, and a new database with that filename will be created. The filename you provide must comply with the DOS filename requirements and must end in "**.mmd**". If you want to create the Summit Central database in another directory or on a network drive, use the *Browse* button to find the appropriate drive. If you want to create the Summit Central database in the Summit Central Folder (summit), simply enter the filename.

- To open a database that already exists, click on the *Open* button.

  Summit Central will ask you to provide a filename, and this must be the name of a Summit Central database you have already created ([filename].mmd).

- To compact and repair an existing database, click on the *Compact & Repair Data File* button. .

  Summit Central will ask you to provide a filename. This must be the name of an existing database, and cannot be in use by you or any other users whilst compacting and repairing. If you want to compact and repair the current Summit Central database, you must either open another database or create a new database before selecting to compact and repair the file you're currently in.

You should compact on a regular basis (i.e. daily or at least weekly), particularly if you have been deleting records or performing large imports. Summit Central databases may need repairing if you have computer, power or network failures during transactions which update multiple tables and indexes. You may suspect a corrupt database if you cannot find a record you know is there or the data presented is nonsensical.